

PROCEDURE FOR A MEDICAL APPOINTMENT

Name: _____

1. PREPARE THE PERSON FOR THE APPOINTMENT <input type="checkbox"/> A. Discuss what is going to happen at the visit <input type="checkbox"/> B. Follow any instructions to medically prepare for the visit (for example, pre-medications, fasting, wearing loose and comfortable clothing, need for accommodation for a wheelchair). <input type="checkbox"/> C. Bring items to keep the person occupied, money for a drink or food.
2. BEFORE YOU LEAVE, MAKE SURE YOU HAVE THE FOLLOWING: <input type="checkbox"/> A. Person's insurance card <input type="checkbox"/> B. Copy of current medication sheets/medication administration record <input type="checkbox"/> C. The following forms depending on the purpose of the appointment: <input type="checkbox"/> Health Record <input type="checkbox"/> Health Care Practitioner Encounter Form <input type="checkbox"/> Annual Physical Form / Annual Health Screening Recommendations <input type="checkbox"/> Health Review Checklist <input type="checkbox"/> D. Directions to the appointment and money for parking <input type="checkbox"/> E. Agency on-call information (in case you need to contact someone else in the agency) and Family/Guardian information <input type="checkbox"/> F. Name of the pharmacy, telephone number and directions
3. WHEN YOU GET TO THE APPOINTMENT, DO THE FOLLOWING: <input type="checkbox"/> A. First, check in with the receptionist and introduce yourself and the person you are accompanying. <input type="checkbox"/> B. State the reason that you are there and any problems the person is having. If the person can speak about their health, encourage and assist him/her to do so. <input type="checkbox"/> C. Discuss any accommodations the person may need in the waiting room.
4. DURING THE APPOINTMENT, HELP THE PERSON AND HEALTH CARE PROFESSIONAL If needed, assist the individual during the appointment. Provide information to the health care professional when asked and/or help the individual to answer questions. If you do not know the answers to the questions, refer the health care professional to the other contact people on the Health Record
5. OBTAIN THE WRITTEN RESULTS OF THE APPOINTMENT AND THE WRITTEN RECOMMENDATIONS: <input type="checkbox"/> A. Obtain completed Annual Physical form and Encounter Form and make sure that the HCP's portion of the form is filled-out. Write down any information that is given to you that is not on the forms. <input type="checkbox"/> B. Pick up any prescriptions. <input type="checkbox"/> C. Please remember to get signed doctor's orders for all prescriptions and treatments. <input type="checkbox"/> D. Set-up another appointment with the receptionist if needed.
6. BRING BACK ALL FORMS, ANY PRESCRIPTIONS, DOCTOR'S ORDERS, AND THE APPOINTMENT CARD TO THE APPROPRIATE PERSON.

If going to the Emergency Room (Hospital)

- Take the person's Medication Records, Insurance Card, Health Record and Encounter form.
- Be prepared to tell Emergency Room staff why you are bringing the person to the ER.
- If you have any concerns about taking the person home (or to work/day program) after the visit, tell the emergency room staff and contact your supervisor before leaving the hospital.